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ABSTRACT

This study compared the equity and adequacy outcomes for plaintiff and nonplaintiff school districts as they relate to the Kentucky Education Reform Act (KERA) of 1990. Both descriptive statistics and correlation analysis were used in comparing variables and in determining the differences in selected finance measures. There were three major findings. First, progress was made in attaining equity in Kentucky school districts 10 years after the implementation of KERA. Second, comparisons of per pupil revenues indicated significant revenue gaps remained among the 176 Kentucky school districts. Third, student achievement gaps increased from 1994-1995 to 1999-2000 between plaintiff and nonplaintiff school districts on the state mandated assessment of student performance. An emerging hypothesis is whether per pupil spending alone assures adequacy or whether adequacy is associated with efficient utilization of the resources available. The disparity in student achievement across the state's 176 districts since KERA implies that not all districts, nor schools within districts, may use the resources at their command equally well. (Contains 8 tables and 24 references.) (Author/SLD)

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The Kentucky Education Reform Act:

A Comparison of Equity & Adequacy Outcomes in Kentucky

Between Plaintiff & Non-Plaintiff School Districts

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Abstract

This study compared the equity and adequacy outcomes for plaintiff and non-plaintiff school districts as they relate to the Kentucky Education Reform Act (KERA) of 1990. Both descriptive statistics and correlation analysis were utilized in comparing variables and in determining the differences in selected finance measures. There were three major findings. First, progress was made in attaining equity in Kentucky school districts ten years after the implementation of KERA. Second, comparisons of per pupil revenues indicated significant revenue gaps remained among the 176 Kentucky school districts. Third, student achievement gaps increased from 1994/95 to 1999/00 between plaintiff and non-plaintiff school districts on the state mandated assessment of student performance. An emerging hypothesis is whether per pupil spending alone assures adequacy or whether adequacy is associated with efficient utilization of the resources available. The disparity in student achievement across the state's 176 districts since KERA implies that not all districts, nor schools within districts, may utilize the resources at their command equally well.

The Kentucky Education Reform Act:

A Comparison of Equity & Adequacy Outcomes in Kentucky

Between Plaintiff & Non-Plaintiff School Districts

Several events have renewed public and private interest in school finance equity litigation: successful court challenges to existing state finance formulas, initiatives related to charter schools and vouchers, and proposals by presidents and state governors for national educational goals and competency tests. Amongst the major school finance issues is the relationship between student expenditures and student achievement (the "achievement gap") that has plagued policy analysts and finance experts at least since 1966. In this paper the researchers compared the equity and adequacy consequences for plaintiff and non-plaintiff school districts five and ten years after the enactment of the Kentucky Education Reform Act (KERA) of 1990.

Introduction

Public school finance reform and school restructuring have been amongst the prominent policy issues at the federal, state, and local levels of government. Between 1970 and 1990 all 50 states enacted school finance reforms that changed the way schools are funded (Odden & Picus, 1992). A number of factors caused school finance reform to occur. Among these were litigation, property tax disparities, inequities in growth of property assessments, inequitable systems of taxation, and education accountability as measured by student performance. Between 1973 and 1992, 41 states experienced school finance litigation focused on "equity" (Hickrod, Hines, Anthony, Dively, & Pruyne, 1992). Equity is the state, ideal or quality of being just, impartial and fair. Starting with A Nation at Risk (1983) policymakers also focused on the issue of "adequacy" (i.e.,

providing the conditions for all students to learn at reasonably high levels). It is one thing to narrow the gap between high and low-spending districts. It is quite another to narrow the adequacy gap between high and low-achieving school districts.

Kentucky represents an ideal state to study the issues of equity and adequacy. The comprehensiveness of KERA provided for both measures in mandating a school finance formula to assure equitable distribution of the state's financial resources and a mandated assessment system to measure progress toward the attainment of measurable, accountable learning goals. In Council v. Wilkinson (1988) plaintiff school districts argued that school funding in Kentucky was inequitable because some school districts had more money to support education, and it was inadequate because of Kentucky's low level of educational achievement when compared with that of surrounding states. If equity and adequacy are not achieved by the school finance adjustments enacted as a result of KERA, can the goals of the total reform package be realized?

The study reported out in this paper attempts to determine the equity and adequacy consequences for plaintiff school districts as compared to non-plaintiff districts 10 years after the implementation of KERA. This paper: (a) provides the background to KERA including positioning the time honored issue between equity and adequacy within the chronology of the Kentucky school finance equity case, (b) describes the General Assembly's response in legislating the Support Education Excellence in Kentucky (SEEK) finance formula (c) describes KERA's accountability system as it relates to state goals and the concept of adequacy, (d) provides the study method and findings and (e) briefly relate these findings as they shed light on Kentucky's progress both to narrow the

gap between student expenditures among the state's 176 districts and to narrow the gap in student achievement.

The Chronology of Kentucky's School Finance Litigation

In April 1985 the Council for Better Education, representing a coalition of 66 local Kentucky school districts, filed a lawsuit seeking a judgment that Kentucky's system for financing its public schools violated the Kentucky Constitution and the fourteenth amendment of the Constitution of the United States. Also included as plaintiffs in the case were 22 individual students, representing as a class "similarly situated students in Kentucky districts" (Council v. Wilkinson, 1988, p. 1). Franklin County Circuit Court Judge Ray Corns decided the case without a jury.

The plaintiffs alleged that the system of financing schools in Kentucky placed too much emphasis on local district expenditures and resulted in an inadequate, inequitable, and inefficient system of public education. These discrepancies were seen as both a violation of the Kentucky Constitution, Sections 1, 3 and 186, the equal protection clause and the due process of law clause of the 14th amendment to the United States Constitution. Additionally, the complaint maintained the entire school system was not efficient under the mandate of Section 183 of the Kentucky Constitution.

Specific questions posed by the plaintiff Council for Better Education to the court were:

1. What does the phrase . . . an efficient system of common schools . . . as outlined in Section 183 of the Kentucky Constitution mean?

2. Is education a fundamental right under the Constitution?

3. Does Kentucky's current method of financing the common schools violate Section 183 of the Kentucky constitution?

4. Are students in property-poor districts denied equal protection of the laws as guaranteed by Sections 1 and 3 of the Kentucky Constitution and the 14th amendment of the US Constitution (Council v. Wilkinson, 1988, p. 2)?

Definitive requirements for providing an educational system, to be followed by the General Assembly, are outlined in Section 183 of the Kentucky Constitution as follows:

> (1) The General Assembly shall bear full responsibility for the enactment of laws to govern the common schools; (2) The schools shall be established as a system, an organic whole, arranged with interdependent parts; (3) The schools shall be public, of the body politic, and shall be governed and controlled by the people; (4) The schools shall be free and common to all with no charges to limit access; (5) The schools shall be financed by tax resources which are distributed in such a manner as to ensure that the quality of a child's education will not be dependent on the fiscal ability of the local school district; (6) The schools shall be funded at a level adequate to provide quality educational programs and services to all school districts; (7) The schools shall be financed in a manner which will prevent the quality of a child's education from being dependent on the vagaries of local tax effort; (8) The school shall provide equitable educational treatment to all children in the accommodation of their

educational needs; and (9) the schools shall be properly managed to assure the most effective and productive use of funds. (Ky. Const. Sec. 183)

Trial proceedings began in April 1988. Evidence at trial demonstrated that school districts with relatively large tax bases were able to raise significantly more money locally than districts with smaller local property tax bases. In addition, plaintiff school districts maintained that districts with lower local tax bases offered fewer courses, operated with larger class sizes and smaller libraries, employed less qualified teachers, and held classes in substandard facilities. Plaintiffs also showed a statistical correlation between school district wealth and student achievement, interpreted to mean that students in districts with relatively large tax bases tended to have higher achievement scores than those in districts with smaller local tax bases (Council v. Wilkinson).

On May 31, 1988, Judge Corns ruled in favor of the plaintiff school districts, parents and students in finding the common school system to be unconstitutional and discriminatory. In finding that the General Assembly had not produced an efficient school system, he mandated goals to be achieved by students, and requirements for financing, curriculum, personnel, accessibility for all children, physical facilities, instructional materials and management of schools. Further expanding the constitutional definition, Judge Corns maintained that an efficient school system is a "tax supported, coordinated organization which provides a free, adequate education to all students throughout the state regardless of the geographical location or local fiscal resources" (Rose v. Council, 1989, p. 194). To be efficient, a school system must provide sufficient physical facilities, teachers, support personnel and instructional materials to enhance the

education process. Judge Corns emphasized that it was the absolute, unequivocal duty of the General Assembly to provide such a system.

The defendants in the case, bypassing the state court of appeals process and led by John Rose, the President of the State Senate and Don Blandford, the Speaker of the State House of Representatives, appealed directly to the Kentucky Supreme Court. The Kentucky Supreme Court agreed to hear the case. The appeal was based on 10 issues including the trial court's findings that the system of common schools was not efficient, that the definition and standards set for an efficient school system were at variance with the Kentucky constitution and that the system to finance Kentucky schools was unconstitutional. The Supreme Court reviewed evidence considered by Judge Corns "including numerous depositions, volumes of oral testimony and a seemingly endless amount of statistical data and reports" (Rose v. Council, 1989, p. 197). In June 1989 the Kentucky Supreme Court issued what has been termed a landmark decision in school finance litigation (Fiske, 1991). The court concluded that ". . . the overall effect of appellants evidence is a virtual concession that Kentucky's system of common schools is under funded and inadequately funded; is fraught with inequalities and inequities . . . is ranked nationally in the lower 20-25% in virtually every category that is used to evaluate educational performance; and is not uniform among the districts in educational opportunity" (Rose v. Council, 1989, p. 197).

The Court went beyond the rulings of Corns' lower court and declared the entire system of common schools in Kentucky unconstitutional. A review of the rationale for the Supreme Court's decision included the court's conclusion that the state's current system of common schools did not comply with the constitutional requirement that the

General Assembly provide an efficient system of common schools throughout the state, "given the overall inadequacy of the educational system when compared to national standards and standards of adjacent states, the great disparity in educational opportunities throughout the state, and the great disparities and inadequacy of financial efforts throughout the state" (Rose v. Council, 1989, p. 188).

To comply with the state's constitutional requirement that the General Assembly provide an efficient system of common schools throughout the Commonwealth, the court also ruled school systems must be funded adequately to achieve their goals and become substantially uniform throughout the state so that "every child is provided with an equal opportunity to have an adequate education" (Rose v. Council, 1989, p. 188). Another significant finding of the court was that the General Assembly must not only establish an efficient system of public schools, but must also monitor the system on a continuous basis so that the system would be maintained in a constitutional manner. The legislature would also have to assure that there "is no waste, no duplication, and no mismanagement at any level" (p. 188). The Supreme Court went to great lengths to emphasize that it was the sole responsibility of the General Assembly to re-create and re-establish a school system, which would comply with the constitutional requirement for an efficient system of common schools throughout the Commonwealth. The court referenced the Kentucky constitutional definition of an efficient system as requiring "substantial uniformity, substantial equity of financial resources and substantial equal educational opportunity for all students" (p. 211).

Financing an adequate system of schools, which would also be uniform and unitary, presented a significant challenge to the Kentucky General Assembly. Suggested

methods of financing the re-established system included increasing taxes, levying new taxes or re-allocating existing funds (Council v. Wilkinson, 1988). Legislation designed to meet the Supreme Court's mandate was enacted as part of House Bill 940, commonly referenced as the Kentucky Education Reform Act of 1990 (KERA).

The fundamental premise behind KERA was the expectation that all students could learn at high levels. Schools therefore would receive more financial resources to assure that this would happen through supplemental allocations tied to free and reduced child count, and assessed property values in the school district. The General Assembly recognized the disparities between school districts and attempted to address the differences in student achievement by having schools measure progress against themselves.

Legislative Response to State Supreme Court Ruling

It is clear that the General Assembly responded to the Supreme Court's decision with a commitment to provide a public school system that would meet the requirements of the Rose v. Council decision and comply with the Kentucky constitution. Critical to the legislative response was the creation of a new system of financing Kentucky's public schools, Support Education Excellence in Kentucky (SEEK), an area that next receives our attention.

A school finance system is integral to reform to the extent that funding arrangements reflect the core values of the system like equality and efficiency (Guthrie, Garms, & Pierce, 1988). The Rose v. Council decision considered the relationship in Kentucky between property wealth and opportunities for students. Judge Corns

concluded that students in wealthier districts were provided opportunities and inputs (e.g., Advanced Placement classes) not available to students in less wealthy districts.

Consistent with the court decision, the legislature, as part of its response to the Supreme Court's Rose v. Council decision, included the following statement declaring its legislative intent:

> It is the intent of the General Assembly to assure substantially equal public school educational opportunities for those in attendance in the public schools of the Commonwealth, but not limit nor to prevent any school district from providing educational services and facilities beyond those assured by the state supported program. The program shall provide for an efficient system of public schools throughout the Commonwealth, as prescribed by Section 183 of the Constitution of Kentucky, and for the manner of distribution of the public school fund among the districts and its use for public school purposes, as prescribed in Section 186 of the Constitution. (Alexander, 1989, p.9)

The General Assembly created SEEK as a three tiered system including a foundation program with a guaranteed tax base, local revenue requirements and local options. Base funding levels, adjustments, enforcement of maximum class size limits and allotment of program funds in SEEK were outlined by statute. The guaranteed base amount of funding per pupil was set by the General Assembly and was the only amount that was constant for all districts. In 1990/91, SEEK's first year, the base guarantee equaled $2,305; by 1999/00 the base guarantee had risen to $2,924 (Office of Educational Accountability, 2000). An adjusted base guarantees an amount of revenue per pupil to be provided for each school district adjusted by a series of factors that affect the cost of

providing services to students. The base amount is adjusted by the following four factors: (a) exceptional (special education) children, (b) transportation, (c) at-risk pupils, and (d) pupils receiving services in a home and/or hospital setting.

Due to differences in school property wealth, some districts raised more money than others through this formula. To assure equity, the adjustments vary between school districts depending on the demographics of the student population in each school district; local effort will also vary from district to district depending on the property wealth per pupil and average daily attendance (ADA) of the district. Additionally, when calculating the SEEK program, all calculations are made on a per pupil ADA basis and the calculated amounts apply to each pupil in the district. SEEK also requires that each school district levy a minimum local equivalent tax rate (ETR) of 30 cents per $100 of assessed property value. This required "Local Effort" is the local contribution to the adjusted base guarantee. The difference between the Local Effort and the adjusted base represents the state SEEK contribution to the local school district (Kentucky School Laws, 1996, pp. 246-249).

In addressing the relationship in Kentucky between property wealth and educational opportunities for students, Rose v. Council concluded students in wealthier districts were provided opportunities and inputs not available to students in less wealthy districts. The SEEK program was structured in such a way as to compensate for this relationship with the goal of achieving financial equity amongst Kentucky's school districts. Equity was one of the main goals of KERA. An equally important goal, to which we now turn our attention, was to determine if the educational learning goals established by KERA had resulted in adequacy.

Kentucky's Accountability System for Student Adequacy

Critical to the success of the reform was the development and implementation of an assessment and accountability system that delegated power and decision making to local schools, and decision-making councils within the schools, but at the same time held schools accountable for meeting KERA goals related to student learning and school performance. To achieve education excellence and improve outputs, the system included rewards and sanctions for school performance. The Kentucky District Assessment Coordinator Implementation Guide (Kentucky Department of Education, 1995) defined the Accountability index as the " . . . statistic that describes the school or school district's success on the academic and non-cognitive goals set forth in the Kentucky Revised Statutes 158.6451(1)" (Appendix A, p.2). Six goals for schools to meet the expected outcomes for students, outlined in KRS 158.6451, included: (a) schools shall expect a high level of achievement of all students; (b) Schools shall develop students' ability to:

1. Use basic communication and mathematics skills for purposes and situations they will encounter throughout their lives;
2. Apply core concepts and principles from mathematics, the sciences, the arts, the humanities, social studies, and practical living studies to situations they will encounter throughout their lives;
3. Become a self-sufficient individual;
4. Become responsible members of a family, work group, or community, including demonstrating effectiveness in community service;
5. Think and solve problems in school situations and in a variety of situations they will encounter in life; and,

6. Connect and integrate experiences and new knowledge from all subject matter fields with what they have previously learned and build on past learning experiences to acquire new information through various media sources;

(c) Schools shall increase their students' rate of school attendance; (d) Schools shall reduce their students dropout and retention rates; (e) Schools shall reduce physical and mental barriers to learning; and (f) Schools shall be measured on the proportion of students who make a successful transition to work, post-secondary education and the military (Kentucky School Laws, 1990, p.232).

The formula for establishing the school and district performance goals was based on a 44-point scale with a state goal of 100. A score of 100 defined proficiency by state standards but in theory schools could exceed proficiency. The concept behind the formula was that within 20 years, all schools would achieve a score of 100 or above and the KERA vision that all students could learn to high levels would have been realized. The scale consisted of four levels of performance including Novice, Apprentice, Proficient, and Distinguished. A school with a score of 100, conceptually would have 100% of the students Proficient in the skills and knowledge areas deemed adequate. In reality, there could still be some students performing below the Proficient level if there were a balancing number of Distinguished students. The Kentucky Department of Education in 1995 addressed the fairness issue in a paper to the Kentucky Board of Education entitled "Maximizing the fairness of the Kentucky Accountability System." The introduction of the paper read in part:

> The Kentucky Accountability Program was designed to be more fair and equitable than previous programs used to make judgments about schools. Traditional programs would compare schools on resources (for example, the number of library books) or academic success (for example, test scores) without regard to any history of inequities in school funding or the financial wherewithal of the local community and parents. KERA changed this by judging schools based on their progress toward state set goals . . . based on school's initial academic scores, and thus took into account many powerful sources of inequity. (p. 1)

In pursuit of fairness, the Kentucky Board of Education established a process whereby schools or school districts could appeal their status. The appeal mechanism was a three-step process and included an internal appeals review, an external review by an "Education Improvement Advisory Committee," and, if requested, a final review and decision by the Kentucky Board of Education. The complexity of providing a fair accountability system can be seen in a study of KERA's accountability system by Petrosko (1990), who insightfully concluded that the assessment system did not account for the mobility of students between schools and districts. Therefore the system level had the most relevance for teachers and principals throughout the state. Petrosko (1991) observed that the many technical components of the Kentucky Instructional Results Information System (KIRIS) were "hard to communicate to policy makers or other audiences" (p. 32).

This researcher also expressed concern regarding the impact that KERA added to the assessment in 1999 to provide more normative and comprehensive dimensions to the test. The study concluded that KIRIS was consistent with the requirements set forth by

KERA and that most stakeholders had some understanding of the rewards and sanctions features. Petrosko recommended, due to parent and teacher demands, that comparative data be provided regarding children in other parts of the United States. He concluded, "most of the [high] stakes are [for] school professionals, not students or parents" (p. 38).

In sum, KIRIS was developed to include an accountability system for assessing student skills and knowledge in core academic areas (reading, mathematics, science, social studies, writing, arts and humanities and practical living and vocational studies) and school performance areas (attendance, retention and dropout rates and successful transition to life). Data components were extensive and included open-response questions (reading, mathematics, science, and social studies), portfolio and on demand writing exercises (writing), and a matrix open-response format (arts and humanities and practical living/vocational studies). Having reviewed the chronology of the Kentucky school finance litigation, and having reviewed the legislative response and implementation of KERA, we now turn our attention to the study reported out in this paper.

Study Method

Despite the absence of a single approach to measuring financial equity and adequacy, there are generally accepted standards for equity found in the literature in education finance: resource accessibility, wealth neutrality, and equal tax yield (Thompson, Wood, Honeyman, & Miller, 1994). The *resource accessibility* standard was applied in this study as a measure of the attainment of educational, as opposed to financial, adequacy as defined by student outcomes. The resource accessibility standard asks whether students have access to resources to appropriate to meet their educational needs. The *wealth neutrality* standard then asks whether those

resources are unacceptably related to local wealth and residence. The *equal tax yield* standard seeks equity for taxpayers and asks whether equal tax effort results in equal yield (Thompson et al., 1994).

This study had three purposes in comparing data from 1994/95 with data from 1999/00: (a) to compare plaintiffs, non-plaintiffs and all districts on measures of district wealth, (b) to compare measures of resource accessibility amongst plaintiffs, non-plaintiffs and all districts, and (c) to compare measures of student outcomes amongst plaintiffs, non-plaintiffs and all districts. The results of the analysis can be utilized to respond to potential claims of formula based inequity between plaintiff and non-plaintiff districts.

Study Design

This design followed that conducted by Thompson, Wood, Honeyman and Miller (1994). The resource accessibility standard, as represented by assessment per pupil and expenditure per pupil, was utilized as the most appropriate standard to determine the degree of equity achieved by plaintiff school districts under KERA. Statistical measurement is a necessary condition in determining equity and adequacy. Data on district expenditures per pupil, wealth (as measured by property assessment per pupil), local tax effort, average teacher salary, and student outcomes were compared across two time periods (1994/95 and 1999/00) amongst three groups (plaintiff districts, non-plaintiff districts, and all districts). The 1994/95 fiscal year was selected since this was the first year a uniform system of valuing property at 100% of real value was required across the commonwealth. The 1999/00 school year was selected since this was the most recent year for which data was available and was also the 10th anniversary of the

enactment of KERA. The appropriate standard in this study for determining the degree of adequacy was the school district score on the state accountability index of student performance.

Sample

The sample consisted of the entire population of the Commonwealth of Kentucky school districts (N = 176). These districts were then divided into two sub-groups: the plaintiff districts in the Council v. Wilkinson litigation (n = 65) and non-plaintiff districts, comprising the remaining districts (n = 111). Plaintiffs in this litigation case were 66 school districts in Kentucky. The analysis itself includes only 65 plaintiff school districts due to the consolidation of two districts.

Data Collection

All data were for the 1994/95 and 1999/00 school years and were provided by the Kentucky Department of Education (KDE). Data collected included assessment per pupil, equivalent tax rates, percentage of at-risk students and percentage of students receiving special education services, which are components of SEEK, the mandated state funding formula. Additional data were district expenditures per pupil and average teacher salary, determined by Judge Corns to be factors related to equity (Council v. Wilkinson, 1988).

Data Analysis

Standard measures of central tendency, mean, range, variance, standard deviation, analysis of correlation coefficients, and analysis of variance were used to evaluate resource accessibility. These tests were applied, by group, to independent variables including assessment per pupil, equivalent tax rates, percentage of at-risk students and

percentage of students receiving special education services, which are components of SEEK, the mandated state funding formula. Additional independent variables were district expenditures per pupil and average teacher salary, determined by Judge Corns to be factors related to equity (Council v. Wilkinson, 1988). These fundamental tools formed the basis for assessing resource accessibility in Kentucky as implemented by KERA.

The resource accessibility standard was also applied in this study as a measure of the attainment of educational, as opposed to financial, adequacy. The resource accessibility standard asks whether students have access to resources to appropriately meet their educational needs. The wealth neutrality standard then asks whether those resources are unacceptably related to local wealth and residence. The tax yield standard seeks equity for taxpayers and asks whether equal tax effort results in equal yield (Thompson et al., 1994).

Study Findings

Tables 1-3 report means, standard deviations, variance, range, minimum and maximum ranges for all three groups regarding assessment per pupil, local tax effort, expenditure per pupil and average teacher salary.

Table 1 reports the derived values for all school districts per pupil property assessment, equivalent tax rates, expenditures per pupil, and average teacher salary for the 1994/95 and 1999/00 school years.

Table 1

Measures of District Wealth for all Kentucky School Districts

Source of Variation	Assess/Pupil 1994/95	Assess/Pupil 1999/00	ETR 1994/95	ETR 1999/00	Exp/Pupil 1994/95	Exp/Pupil 1999/00	ATS 1994/95	ATS 1999/00
Mean	153,758	223,735	57.27	58.11	5,433	6,698	33,589	37,628
St. Dev.	65,295	94,368	11.25	11.16	693	736	1,712	1,879
Variance	$4.26x10^9$	$8.91x10^9$	126.63	124.61	479,802	541,149	2,929,961	3,531,198
Range	441,741	561,966	81.40	67.80	5,733	4,903	11,882	14,800
Min.	54,746	57,484	31.30	41.60	4,147	5,363	29,673	31,891
Max.	496,487	619,450	112.7	109.40	9,880	10,266	41,555	46,691

Note. All numbers represent amount in dollars, except tax rate. N = 176 school districts. ETR = equivalent tax rate. ATS = average teacher salary.

When comparing assessment per pupil (Assess/Pupil) values for all Kentucky school districts, range values increased 27.22% from $441,741 in 1994/95 to $561,966 in 1999/00. (Ranges were computed by subtracting the 1999/00 range from the 1994/95 range and the increase or decrease computed.) Range values for equivalent tax rate (ETR) decreased 16.71% from 81.40 in 1994/95 to 67.80 in 1999/00. Upper range values also decreased 14.48% for expenditure per pupil (Exp/Pupil) from $5,733 in 1994/95 to $4,903 in 1999/00. However, the ranges for average teacher salary (ATS) increased 24.56% from $11,882 in 1994/95 to $14,800 in 1999/00.

Because Kentucky has greater diversity in district sizes than was represented by plaintiff school districts, comparisons between plaintiffs and the rest of the state in funding and expenditures per pupil should be interpreted with caution. Nevertheless, Tables 2 (plaintiff districts) and 3 (non-plaintiff districts) show per pupil property assessments, equivalent tax rates, expenditures per pupil, and average teacher salary,

thereby giving some preliminary indication of the relative position of plaintiffs and non-plaintiffs to the remainder of the state's school districts.

Table 2

Measures of District Wealth for Plaintiff School Districts for 1994/95 and 1999/00

Source of Variation	Assess/Pupil 1994/95	Assess/Pupil 1999/00	ETR 1994/95	ETR 1999/00	Exp/Pupil 1994/95	Exp/Pupil 1999/00	ATS 1994/95	ATS 1999/00
Mean	124,627	180,946	57.02	57.67	5,517	6,748	33,478	37,622
St. Dev.	52,510	64,393	10.65	10.19	577	663	1,438	1,714
Variance	$1.81x10^9$	$4.15x10^9$	113.42	103.77	332,376	439,645	2,069,102	2,937,715
Range	184,913	286,745	56.5	42.00	2,811	2,978	7,782	9,339
Min.	57,388	57,485	31.3	46.20	4,496	5,494	30,999	34,022
Max.	242,301	344,228	87.8	88.20	7,308	8,472	38,781	43,361

Note. All numbers represent amount in dollars, except tax rate. N = 176 school districts. ETR = equivalent tax rate. ATS = average teacher salary.

When comparing assessment per pupil values for plaintiff districts, range values increased 55.07% from $184,913 in 1994/95 to $286,744 in 1999/00. Range values for equivalent tax rate deceased 25.66% from 56.50 in 1994/95 to 42.00 in 1999/00 while the range for expenditures per pupil increased 5.94% from $2,811 in 1994/95 to $2,978 in 1999/00. The range for average teacher salary also increased 20.01% from $7,782 in 1994/95 to $9,339 in 1999/00

Table 3

Measures of District Wealth for Non-Plaintiff School Districts for 1994/95 and 1999/00

Source of Variation	Assess/Pupil 1994/95	Assess/Pupil 1999/00	ETR 1994/95	ETR 1999/00	Exp/Pupil 1994/95	Exp/Pupil 1999/00	ATS 1994/95	ATS 1999/00
Mean	170,816	248,792	57.41	58.37	5,384	6,669	33,655	37,632
St. Dev.	70,259	100,196	11.64	11.73	751	776	1,856	1,977
Variance	$4.94x10^9$	$1.00x10^{10}$	135.41	137.69	563,387	602,852	3,445,751	3,908,567
Range	441,741	540,851	75.80	67.80	5,733	4,903	11,882	14,800
Min.	54,746	78,599	36.90	41.60	4,147	5,363	29,673	31,891
Max.	496,487	619,451	112.70	109.40	9,880	10,266	41,555	46,691

Note. All numbers represent amount in dollars, except tax rate. N = 176 school districts. ETR = equivalent tax rate. ATS = average teacher salary.

When comparing assessment per pupil values for non-plaintiff districts, range values increased 22.4% from $441,741 in 1994/95 to $540,851 in 1999/00. Range values for equivalent tax rate decreased 10.55% from 75.80 in 1994/95 to 67.80 in 1999/00. Range values also decreased 14.48% for expenditure per pupil from $5,733 in 1994/95 to $4,903 in 1999/00. However, the range for average teacher salary increased 24.56% from $11,882 in 1994/95 to $14,800 in 1999/00.

Analysis of data of descriptive statistics for the 1994/95 and 1999/00 school years for all school districts, plaintiff and non-plaintiff districts indicated a similar pattern of increases in assessment per pupil for all districts (27.22%) and non-plaintiffs (22.40%) with a significantly higher increase (55.07%) for plaintiff districts. All groups reported decreases in range of equivalent tax rates with all districts (-16.71%) and non-plaintiff (-10.55%) lower than plaintiff (-25.66%) districts. Ranges of expenditures per pupil revealed identical ranges for all districts (-14.48%) and non-plaintiffs (-14.48%) but a

higher range (5.91%) for plaintiff districts. Average teacher salary did not indicate a meaningful difference between groups and was consistently higher for all groups with all districts' and non-plaintiffs' data indicating a 24.56% increase and plaintiffs reporting a 20.01% increase in range.

Our first analysis consists of comparing the two sets of data (i.e., 1994/95 with 1999/00) means and standard deviations as they relate to assessment per pupil, equivalent tax rate, expenditure per pupil and average teacher salary. Table 4 illustrates the mean and standard deviation values for all groups for per pupil property assessments, equivalent tax rates, expenditures per pupil, and average teacher salary for all districts, plaintiff and non-plaintiff districts, thereby reporting the relative position of plaintiffs to the remainder of the state's school districts.

Table 4

Comparisons of Measures of Wealth for All Districts, Plaintiffs, and Non-Plaintiffs

1994/95 and 1999/00

		All Districts		Plaintiffs		Non-Plaintiffs	
		1994/95	1999/00	1994/95	1999/00	1994/95	1999/00
Assess/Pupil	Means	153,758	223,735	124,627	180,946	170,816	248,792
	St. Dev.	65,295	94,367	42,510	64,394	70,259	100,197
ETR	Means	57.27	58.11	57.02	57.67	57.41	58.37
	St. Dev.	11.26	11.16	10.65	10.19	11.64	11.73
Exp/Pupil	Means	5,433	6,698	5,517	6,748	5,384	6,669
	St. Dev.	692	736	577	663	751	776
ATS	Means	33,590	37,629	33,478	37,623	33,655	37,632
	St. Dev.	1,712	1,879	1,438	1,879	1,856	1,977

Note. All numbers represent amount in dollars, except tax rate. N = 176 school districts, n = 111 for non-plaintiff districts, and n = 65 for plaintiff districts. ETR = equivalent tax rate. ATS = average teacher salary.

In 1994/95 differences in mean expenditures per pupil between plaintiff and non-plaintiff districts were $133 more for plaintiff districts and $84 more between plaintiffs

compared to all districts. Assuming that Judge Corn's assessment of the Plaintiff's assertions that fewer financial resources were available to plaintiff districts was correct, then the status had reversed itself by 1994/95. However, in contrast to plaintiff's higher mean expenditures, the non-plaintiff districts continue to demonstrate more wealth as shown by per pupil assessment. Thus, non-plaintiff districts were 37% wealthier than plaintiff districts yet had lower (2.47%) per pupil expenditures in 1994/95.

As demonstrated by comparing mean assessment per pupil values between 1994/95 and 1999/00, the wealth in non-plaintiff ($248,792 - $170, 816 = $77,976) districts increased more (38.45%) than plaintiff districts ($180,946 - $124,627 = $56,319). This result is meaningful because the 100% valuation requirement, fully enacted in 1994/95, was intended to standardize property valuation methods. When comparing mean equivalent tax rates, a slight increase (-1.67%) was reported for non-plaintiff districts (.96) while plaintiff districts increased .65, indicating non-plaintiff districts increased tax rates more than plaintiff districts. For 1999/00 expenditures per pupil increased by $1,231 in plaintiff districts and by $1,285 in non-plaintiff districts indicating non-plaintiff districts increased spending levels more (by $54 per pupil) than plaintiff districts. Average teacher salary data indicate plaintiff districts increased average teacher salary by $4,145 and non-plaintiff districts by $3,977. Plaintiff districts increased average teacher salary slightly more (4.20%) than non-plaintiff districts.

In 1994/95 standard deviations were higher for non-plaintiff than plaintiff districts, indicating more variability for non-plaintiffs and implying greater equity for plaintiff districts in the assessment per pupil, equivalent tax rate, expenditure per pupil and average teacher salary. Standard deviations for all districts was higher in all four

categories for all districts as compared to plaintiffs in 1994/95 while mean average teacher salary was about equal in all comparison groups. In 1999/00, the standard deviation was also higher for the non-plaintiffs, as compared to the plaintiffs, in all four categories indicating more variability (and consequently greater equity) than the plaintiff group. The standard deviation for all districts was higher than that of plaintiffs in 1999/00 but less than non-plaintiffs, indicating progress had been made in bringing about greater equity for plaintiff districts in relation to the resource accessibility standard. Table 5 reports comparisons of non-plaintiff, plaintiff, and all districts on Measures of Resource Accessibility and Student Accountability Index for the 1994/95 school year.

Table 5

Comparisons of Non-plaintiff, Plaintiff, and All Districts on Measures of Resource Accessibility and Student Accountability Index (1994/95)

	Mean	St. Dev.	Min.	Max.	Range
Non-plaintiff					
ETR	57.41	11.64	36.90	112.70	75.80
Exp/Pupil	5,384	751	4,147	9,880	5,733
Assess/Pupil	170,816	70,259	54,746	496,487	441,741
Acc. Index	46.08	5.28	32.20	64.70	32.50
Plaintiff					
ETR	57.02	10.65	31.30	87.80	56.50
Exp/Pupil	5517	577	4,496	7,308	2,811
Assess/Pupil	124,627	42,410	57,388	242,301	184,913
Acc. Index	44.38	4.97	33.00	59.70	26.70
All districts					
ETR	57.27	11.26	31.30	112.70	81.40
Exp/Pupil	5,433	693	4,147	9,880	5,733
Assess/Pupil	158,758	65,295	54,746	496,487	441,741
Acc. Index	45.46	5.22	32.20	64.70	32.50

Note. All numbers represent amount in dollars, except tax rate. N = 176 school districts. ETR = equivalent tax rate. ATS = average teacher salary. Acc. Index = Accountability Index.

As demonstrated by comparing assessment per pupil values in 1994/95, the ranges of wealth in non-plaintiff and all districts ($496,487 - $54,746 = $441,741) increased

dramatically more (138%) than those of plaintiff districts ($242,301 - $57,388 = $184,913). That plaintiff districts were less wealthy than either non-plaintiff districts or the state as a whole was especially apparent when considering these comparison groups by category. Both the expenditure per pupil and assessment per pupil differences were found in districts holding extremely high or extremely low wealth. While both the expenditure per pupil and assessment per pupil differences were found to be located in districts holding extremely high or extremely low wealth, that plaintiff districts outspent non-plaintiff districts ($5,517 vs. $5,384) implies equity in the resource allocation standard had been met according to the 1994/95 data with plaintiff districts spending slightly more (2.47%) per pupil than plaintiff districts.

Also in 1994/95 plaintiffs had a slightly higher mean of expenditures per pupil than all districts ($5,517 to $5,433). However, more significant is the finding that mean scores on state assessments of student achievement (Accountability Index) were higher, as indicated in Table 5, for non-plaintiff (46.08) and all districts (45.46) as compared to that of plaintiff (44.38) districts. Therefore, plaintiff districts had achieved less than non-plaintiff districts in terms of educational adequacy in 1994/95.

Results of comparisons of non-plaintiff, plaintiff, and all districts on Measures of Resource Accessibility and Student Accountability Index for the 1999/00 school year are reported in Table 6.

Table 6

Comparisons of Non-plaintiff, Plaintiff, and All Districts on Measures of Resource Accessibility and Student Accountability Index (1999/00)

	Mean	St. Dev.	Min.	Max.	Range
Non-plaintiff					
ETR	58.37	11.73	41.60	109.40	67.80
Exp/Pupil	6,669	776	5,363	10,266	4,903
Assess/Pupil	248,792	100,197	78,599	619,450	540,851
Acc. Index	61.22	6.10	45.8	85.3	39.5
Plaintiff					
ETR	57.67	10.19	46.20	88.20	42.00
Exp/Pupil	6,748	663	5,494	8,472	2,978
Assess/Pupil	180,946	643,393	57,485	344,229	286,745
Acc. Index	58.68	4.65	47.1	68.7	21.6
All districts					
ETR	58.11	11.16	41.60	109.40	67.80
Exp/Pupil	6,698	736	5,363	10,266	4,903
Assess/Pupil	223,735	94,368	57,485	619,451	561,966
Acc. Index	60.28	5.73	45.8	85.3	39.5

Note. All numbers represent amount in dollars, except tax rate. N = 176 school districts. ETR = equivalent tax rate. ATS = average teacher salary. Acc. Index = Accountability Index.

Analysis of 1999/00 data showed ranges of these variables were also noteworthy. Non-plaintiff districts had greater average wealth per pupil ($248,792) than was true for either plaintiff ($180,946) or all ($223,735) districts. The range of wealth in all districts was in fact dramatic, as wealth varied by $561,967 per pupil between the highest ($619,450) and lowest ($57,484) wealth districts in the state. That plaintiff districts remained less wealthy ($180,946) than either non-plaintiff districts ($248,792) or the state as a whole ($223,735) was especially interesting when considering these comparison groups by category. Again, that plaintiff districts ($6,748) outspent non-plaintiff districts ($6,669) implies that the resource allocation standard had been met according to the 1999/00 data with plaintiff districts spending slightly more (1.18%) per pupil than non-plaintiff districts. As reported in Table 6, plaintiffs also had a slightly

higher (.07%) mean of expenditures per pupil than the state as a whole ($6,748 to $6,698).

However, in 1999/00 plaintiff districts had a lower mean student achievement score average (58.68) than that of non-plaintiff (61.22) or of all districts (60.28). So consistent with the 1994/95 data, plaintiff districts continued to achieve less in terms of educational adequacy, as measured by the state assessment program in 1999/00. It is also important to note that plaintiff districts have achieved a smaller increase in state assessment scores (14.29) over the five-year period than either non-plaintiff (15.13) or all districts (14.82). So comparisons of state assessment scores, between the 1994/95 and 1999/00 school years, indicates a widening gap between both scores achieved by group and percentage increases with plaintiff districts falling further behind non-plaintiff districts.

The relationships between variables are also a factor in determining equity outcomes. In Table 7, a correlation matrix representing the 1994/95 school year for equivalent tax rate, expenditure per pupil, average teacher salary, percentage of at-risk students, percentage of special education students and assessment per pupil for all districts, non-plaintiff districts and plaintiff districts is presented.

Table 7

Correlation Coefficients for Assessment Per Pupil and Other Variables for all Districts, Non-plaintiff and Plaintiff Groups (1994/95)

	All Districts	Non-plaintiff	Plaintiff
N = 176	176	111	65
ETR	.079	.174	-.225
EXP/P.P.	-.001	.115	-.270*
ATS	.347**	.410**	.154
% At-Risk	-.655**	-.676**	-.499**
% Sp. Ed.	-.198**	-.112	-.266*

Note. All numbers represent amount in dollars, except tax rate. N = 176 school districts. ETR = equivalent tax rate. ATS = average teacher salary.
* Correlation is significant at the .05 level (2-tailed). ** Correlation is significant at the .01 level (2-tailed).

Analysis of data reported in Table 7 indicates the highest positive correlations for the 1994/95 school year are between assessment per pupil and average teacher salary for all three groups. The correlation for all districts was .347, for non-plaintiff districts .410, and for plaintiff districts .154. Average teacher salary correlations for all districts and non-plaintiff districts were statistically significant at the .01 level. The highest negative correlation was between assessment per pupil and percent at-risk for all three groups. The correlations were statistically significant (at .01) for all districts (-.655), for non-plaintiff districts (-676) and for plaintiff districts (-.499) reinforcing the contention property assessment per pupil is an indication of district wealth and the percent at-risk population an indicator of poverty. Correlation coefficients for assessment per pupil and other variables for all groups for the 1999/00 school year are reported in Table 8.

Table 8

Correlation Coefficients for Assessment Per Pupil and Other Variables for all Districts, Non-plaintiff and Plaintiff Groups (1999/00)

	All Districts	Non-plaintiff	Plaintiff
N = 176	176	111	65
ETR	.122	.214*	-.170
EXP/P.P.	-.056	-.015	-.120
ATS	.336**	.392**	.265*
% At-Risk	-.659**	-.661**	-.544**
% Sp. Ed.	-.279**	-.271**	-.221

Note. * Correlation is significant at the .05 level (2-tailed). ** Correlation is significant at the .01 level (2-tailed).

Consistent with the 1994/95 analyses, correlations for the 1999/00 school year between assessment per pupil and expenditure per pupil are negative for all three groups. The correlation for all districts was -.056, for non-plaintiff districts -.015, and for plaintiff districts, -.120. (None of the three correlations were statistically significant.) The highest negative correlations, also consistent with the 1994/95 data, were between assessment per pupil and percent at-risk. All group correlations between assessment per pupil, percent at-risk and percent special education are negative. The negative correlation between assessment per pupil and equivalent tax rate (-.170), represented by plaintiff districts, contradicts a positive correlation for all districts (.122) and non-plaintiff districts (.214). This pattern is consistent with that observed in 1994/95. While wealth measures are important, as evidenced by the positive correlations to average teacher salary, the most significant relationships reported were in the negative correlations observed among all variables, the percent at risk and percent special education students.

Summary and Conclusions

There were three major findings in this study. First, equity, determined by analysis of expenditures per pupil, has been achieved between plaintiff and non-plaintiff school districts 10 years after the implementation of KERA. In 1994/95 plaintiffs spent $5517 while non-plaintiffs spent $5384 per student; in 1999/00 plaintiff districts spent $6748 while non-plaintiffs spent $6669. Second, regarding resource accessibility, despite the fact that assessment per pupil has widened from $441,741 in 1994/95 to $561,966 in 1999/00, the range in per pupil expenditures has narrowed from $5733 in 1994/95 to $4903 in 1999/00 indicating progress has been made for plaintiff school district students in narrowing the gap in per pupil expenditures. While plaintiff districts correlations (-270) were significant at the .01 level, all districts (-.001) and non-plaintiff districts (.115) did not indicate relationships interpreted as meaningful. The same analysis conducted for the 1999/00 school year (Table 8) indicated no significant correlation between assessment per pupil and expenditures per pupil values for any of the groups. However, comparisons (Table 1) of district expenditures per pupil indicate significant revenue and spending gaps remain among Kentucky school districts 10 years after the Rose v. Council decision. Third, achievement gaps increased from 1994/95 to 1999/00 between plaintiff and non-plaintiff school districts on the state-mandated assessment of student performance, indicating a widening gap between plaintiff and non-plaintiff district scores on the state mandated assessment of student performance.

The result of remedies implemented by SEEK, within the framework of this analysis, support a conclusion that progress has been made in attaining financial equity, based on the resource accountability standard, in Kentucky 10 years after the implementation of KERA. However, educational adequacy disparities remain between school districts as indicated by a widening gap between plaintiff and non-plaintiff district scores on the state mandated assessment of student performance.

What is not clear from this study is whether per pupil spending alone assures the attainment of adequacy or whether adequacy is a quality issue more associated with efficient utilization of the resources available. The wide variety of quality evident in school performance in Kentucky since KERA would suggest that not all districts, nor schools within the same district, are likely to utilize the resources at their command equally well. These results lead to the speculation that this study is only one step toward understanding the relationship between equity and adequacy. Still at issue is funding outside the SEEK calculation. Finally, the authors note that the policy option of tinkering with SEEK versus more effective and efficient usage of existing resources (including time as well as money) may not simply be either/or, but both/and. Only further study can shed light on the most effective policy response to improving equity and providing a more adequate and efficient system of education for all children in Kentucky.

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